

Date/Time Stamp
RECEIVED
SECRETARY OF THE SENATE
PUBLIC RECORDS
2019 NOV 14 AM 10:37

SUBMIT DIRECTLY TO THE OFFICE OF PUBLIC RECORDS IN 232 HART BUILDING

Purpose of Amendment (describe the reason for amending original submission): Amended RE-2
transportation expenses, as I drove my car and
paid for valet. Emailed correspondence attached
regarding my repayment from the Heritage
Fundation

11/14/2019
(Date)

(Signature of Traveler)

[illegible]

United States Senate

SELECT COMMITTEE ON ETHICS

October 7, 2019

Chandler Shields
Office of Senator Richard C. Shelby
United States Senate
Washington, DC 20510

Dear Mr. Shields:

This responds to your recent correspondence concerning an invitation you received to travel to the *2019 Emerging Leaders Conference*, in Baltimore, Maryland, on October 9–11, 2019, sponsored by The Heritage Foundation. The Heritage Foundation certified to the Select Committee on Ethics (the Committee) that it will pay the *necessary expenses*¹ related to the travel and that it is neither a lobbyist, lobbying firm, agent of a foreign principal, or otherwise acting as a representative or agent of a foreign government. The Heritage Foundation has also certified that it does not retain or employ a registered lobbyist or agent of a foreign principal and that no registered lobbyist or agent of a foreign principal will accompany you at *any point throughout your trip*.²

Based on information and materials available to the Committee, and assuming the **actual** travel and travel-related expenses conform to the information and materials you provided, it appears that the proposed payment or reimbursement of necessary expenses for this trip **may be accepted** under relevant Senate Rules and the Committee's *Regulations and Guidelines for Privately-Sponsored Travel*, so long as at the time of the payment or reimbursement, The Heritage Foundation is neither a registered lobbyist or lobbying firm under the Lobbying Disclosure Act of 1995, or an agent of a foreign principal under the Foreign Agents Registration Act (and is not otherwise acting as a representative or agent of a foreign government), and provided the travel and all required documents are disclosed to the Secretary of the Senate in accordance with the provisions of Senate Rules 34 and 35.

Under Senate Rule 35, Senate staff must receive advance authorization signed by the Member or officer under whose direct supervision the individual works in order to accept payment or reimbursement for necessary expenses related to fact-finding travel. Further, such authorization and expenses must be disclosed to the Secretary of the Senate by filing the completed *Employee Pre-Travel Authorization* and the *Employee Post-Travel Disclosure of Travel Expenses* (Form RE-1 and Form RE-2), along with a copy of the *Private Sponsor Travel Certification Form*, and all relevant attachments (e.g., the private sponsor's invitation and itinerary) **within 30 days of the conclusion of Privately-Sponsored Travel**.

¹ The term "necessary expenses" has a specific definition. See *Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel – Glossary of Terms* at 8.

² The term "any point throughout your trip" has a specific definition. See *id.* at 2.

LN
M
M
C
C
C
C
C
C
C
C
C

Finally, Senate Rule 34 requires a reporting individual,³ on his or her Financial Disclosure Report, to make an annual disclosure of the receipt of payments or reimbursements under Senate Rule 35 from a private sponsor for officially-related travel expenses where, in the aggregate, travel expenses exceed \$390 from that sponsor during a calendar year. However, if a Member, officer, or employee properly reports the receipt of necessary expenses for such travel to the Secretary of the Senate within 30 days of the travel, as discussed above, the travel expenses need not be disclosed a second time on their Financial Disclosure Report.

I hope you find this information helpful. If you have any additional questions, please do not hesitate to contact the Committee.

Sincerely,



Deborah Sue Mayer
Chief Counsel and Staff Director

Enclosure: Travel Checklist

00000000003330

³ A reporting individual is someone whose salary equals or exceeds 120% of the basic rate of pay for GS-15 (\$127,914 for CY 2019) or is a political fund designee and is required to file Financial Disclosure Reports.

Employee Post-Travel Disclosure of Travel Expenses

Date/Time Stamp:

Post-Travel Filing Instructions: Complete this form within **30 days** of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building**.

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☒ The **original** *Employee Pre-Travel Authorization* (Form RE-1), **AND**
☒ A **copy** of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): The Heritage Foundation

Travel date(s): Wednesday, October 9 - Friday, October 11, 2019

Name of accompanying family member (if any): n/a

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	\$48.00	\$304.00 + tax	\$137.00	n/a
<input checked="" type="checkbox"/> Actual Amount				

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	n/a	n/a	n/a	n/a
<input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.):

See attached agenda.

11/12/19
(Date)

Chandler Shields
(Printed name of traveler)

Chandler Shields
(Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

11/12/2019
(Date)

Richard Helter
(Signature of Supervising Senator/Officer)

Shields, Chandler (Shelby)

From: Kinney, Audra <Audra.Kinney@heritage.org>
Sent: Friday, November 8, 2019 11:18 AM
To: Shields, Chandler (Shelby)
Subject: RE: ELC Ethics Paperwork

Follow Up Flag: Follow up
Flag Status: Flagged

Thank you so much! I'm so excited, sad to be leaving Heritage though.

I just submitted the invoice to Accounting, you'll receive the reimbursement in the mail within the month. I don't need a copy of the post travel! Let me know if you have any questions at all!

Audra Kinney
Program Associate, Congressional Relations
The Heritage Foundation
214 Massachusetts Avenue, NE
Washington, DC 20002
202-608-6058
heritage.org

From: Shields, Chandler (Shelby) <Chandler_Shields@shelby.senate.gov>
Sent: Friday, November 8, 2019 10:36 AM
To: Kinney, Audra <Audra.Kinney@heritage.org>
Subject: Re: ELC Ethics Paperwork

Oh how exciting! Hope you are excited for your new opportunity. I have attached the W9 form. Do you need a copy of my updated post travel form?

Thanks!
Chandler

From: Kinney, Audra <Audra.Kinney@heritage.org>
Sent: Thursday, November 7, 2019 11:20 AM
To: Shields, Chandler (Shelby)
Subject: RE: ELC Ethics Paperwork

Hey girl yes! I'm so sorry I've been so slow getting everything back to you. Next week is my last week at Heritage, I have been a bit all over the place!!

I spoke to Accounting yesterday, and you are required to fill out a W-9 in order for us to reimburse you. Our Accounting team will send the reimbursement to the address you list on the form. For the post travel form, you just need to fill in the cost of parking in the blank that asks for the transportation cost.

Let me know if I can answer any additional questions!

Employee Post-Travel Disclosure of Travel Expenses

Post-Travel Filing Instructions: Complete this form within **30 days** of returning from travel. Submit all forms to the **Office of Public Records in 232 Hart Building**.

In compliance with Rule 35.2(a) and (c), I make the following disclosures with respect to travel expenses that have been or will be reimbursed/paid for me. I also certify that I have attached:

- ☒ The original *Employee Pre-Travel Authorization* (Form RE-1), **AND**
☒ A copy of the *Private Sponsor Travel Certification Form* with all attachments (itinerary, invitee list, etc.)

Private Sponsor(s) (list all): The Heritage Foundation

Travel date(s): Wednesday, October 9 - Friday, October 11, 2019

Name of accompanying family member (if any): n/a

Relationship to Traveler: ☐ Spouse ☐ Child

IF THE COST OF LODGING **DID NOT INCREASE** DUE TO THE ACCOMPANYING SPOUSE OR DEPENDENT CHILD, ONLY INCLUDE LODGING COSTS IN EMPLOYEE EXPENSES. (Attach additional pages if necessary.)

Expenses for Employee:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	\$0	\$304.00 + tax	\$137.00	n/a
<input checked="" type="checkbox"/> Actual Amount				

Expenses for Accompanying Spouse or Dependent Child (if applicable):

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
<input type="checkbox"/> Good Faith Estimate	n/a	n/a	n/a	n/a
<input type="checkbox"/> Actual Amount				

Provide a description of all meetings and events attended. See Senate Rule 35.2(c)(6). (Attach additional pages if necessary.): See attached agenda.

10/22/19 Chandler Shields Chandler Shields
 (Date) (Printed name of traveler) (Signature of traveler)

TO BE COMPLETED BY SUPERVISING MEMBER/OFFICER:

I have made a determination that the expenses set out above in connections with travel described in the *Employee Pre-Travel Authorization* form, are necessary transportation, lodging, and related expenses as defined in Rule 35.

10/22/19 Richard Shields
 (Date) (Signature of Supervising Senator/Officer)

Date/Time Stamp:

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics in SH-220**. Incomplete and late travel submissions will **not** be considered or approved. This form **must** be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Name of Traveler: Chandler Shields

Employing Office/Committee: Sen. Richard Shelby

Private Sponsor(s) (list all): The Heritage Foundation

Travel date(s): Oct. 9-11, 2019

*Note: If you plan to extend the trip for any reason you **must** notify the Committee.*

Destination(s): Baltimore, MD

Explain how this trip is specifically connected to the traveler's official or representational duties:

This trip will benefit my line of work as I have recently been assigned the education portfolio for Sen. Shelby. There is an entire breakout session dedicated to higher education. Additionally, the budget simulation will be incredibly helpful in gaining a grasp on the Appropriations process, especially considering my boss' role as Chairman. In my official title as the Assistant to the Chief of Staff, I am looking forward to gaining more legislative understanding as I currently operate in a very administrative role.

Name of accompanying family member (if any): n/a

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

9/24/19
(Date)

Chandler Shields
(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, Sen. Richard Shelby hereby authorize Chandler Shields.
(Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

9/24/19
(Date)

Richard Shelby
(Signature of Supervising Senator/Officer)



214 Massachusetts Avenue, NE

Washington, DC 20002

(202) 546-4400

heritage.org

Chandler Shields

304 Russell Senate Office Building 2 Constitution Avenue, NE
Washington, DC 20510-0103

On behalf of The Heritage Foundation, I want to formally extend an invitation to The Heritage Foundation's 2019 Emerging Leaders Conference. The event will be held Wednesday, October 9 – Friday, October 11 in the Inner Harbor in Baltimore, MD.

All paperwork must be submitted to the Ethics Committee no later than Monday, September 9, 2019. Here is what you need to submit for this year's trip:

- Emerging Leaders will be held during a recess week for both House and Senate staff. Heritage will provide transportation, overnight accommodations, and meals throughout the retreat.

Please let me know if you have any questions. Looking forward to having you with us this year.

W. S. B.

Thomas Binion
Vice President, Government Relations
The Heritage Foundation

2
 3
 4
 5
 6
 7
 8
 9
 10
 11
 12

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

- Private Sponsor Certification - Page 1 of 4

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

– OR –

☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10*).

– OR –

☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

The Heritage Foundation is the sole sponsor of the trip and is solely responsible for its execution.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

The Heritage Foundation is a research and educational institution whose mission is to formulate and promote conservative public policies. This conference is part of that educational mission.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:

The Heritage Foundation hosted similar conferences in 2016, 2017, and 2018. Additionally, Heritage hosted numerous staff-level conferences connected to educational fellowships, as well as an annual member-level conference for members of the House of Representatives.

Emerging Leaders Conference 2019

Wednesday, October 9 – Friday, October 11, 2019
Royal Sonesta Harbor Court | Baltimore, MD

AGENDA

WEDNESDAY, OCTOBER 9, 2019

- 1:00 p.m. – 1:30 p.m. **ATTENDEE CHECK-IN** *The Heritage Foundation*
Attendees leave luggage at the bus after check-in
- 1:45 p.m. **ATTENDEES BOARD THE BUS**
- 2:00 p.m. **BUSES DEPART TO ROYAL SONESTA HARBOR COURT**
- 3:15 p.m. **BUSES ARRIVE AT ROYAL SONESTA HARBOR COURT**
- 3:30 – 5:30 p.m. **REGISTRATION**
Attendees check-in to overnight rooms
- 5:30 – 6:30 p.m. **WELCOME RECEPTION AND OVERVIEW**
Participants will gather for the first time as a group to hear brief welcome remarks. These remarks will include the purpose of the conference, a review of the agenda, and an opportunity for participants to ask any questions about logistics.

Tommy Binion
Vice President, Government Relations
The Heritage Foundation
- 6:30 – 8:30 p.m. **OPENING DINNER AND KEYNOTE ADDRESS**
LESSONS ON SERVANT LEADERSHIP
Servant leadership is critical in leading effective teams and living a life of purpose. Through experiences in the NFL, House of Representatives, and now at his own veterans' aid charity, Yellow Ribbons United, Derrick Dockery has led a life that exemplifies servant leadership. Dockery will discuss what it means to be a servant leader and how to use one's talents effectively to give back to their community and live a purposeful life for others.

Derrick Dockery
Co-Founder, Yellow Ribbons United
Former Business & Intergovernmental Coalitions Director, Office of Speaker Paul Ryan
Former Offensive Lineman, National Football League

THURSDAY, OCTOBER 10, 2019

- 9:00 – 10:15 a.m. **BREAKFAST ADDRESS AND EMERGING ISSUE #1**
TECHNOLOGY & THE FUTURE OF U.S. NATIONAL SECURITY

1
 2
 3
 4
 5
 6
 7
 8
 9
 10
 11
 12
 13
 14
 15

1
 2
 3
 4
 5
 6
 7
 8
 9
 10
 11
 12
 13
 14
 15

1
 2
 3
 4
 5
 6
 7
 8
 9
 10
 11
 12
 13
 14
 15

1
 2
 3
 4
 5
 6
 7
 8
 9
 10
 11
 12
 13
 14
 15

1
 2
 3
 4
 5
 6
 7
 8
 9
 10
 11
 12
 13
 14
 15

1
 2
 3
 4
 5
 6
 7
 8
 9
 10
 11
 12
 13
 14
 15

1
 2
 3
 4
 5
 6
 7
 8
 9
 10
 11
 12
 13
 14
 15

1
 2
 3
 4
 5
 6
 7
 8
 9
 10
 11
 12
 13
 14
 15

1
 2
 3
 4
 5
 6
 7
 8
 9
 10
 11
 12
 13
 14
 15

1
 2
 3
 4
 5
 6
 7
 8
 9
 10
 11
 12
 13
 14
 15

1
 2
 3
 4
 5
 6
 7
 8
 9
 10
 11
 12
 13
 14
 15

1
 2
 3
 4
 5
 6
 7
 8
 9
 10
 11
 12
 13
 14
 15

1
 2
 3
 4
 5
 6
 7
 8
 9
 10
 11
 12
 13
 14
 15

1
 2
 3
 4
 5
 6
 7
 8
 9
 10
 11
 12
 13
 14
 15

1
 2
 3
 4
 5
 6
 7
 8
 9
 10
 11
 12
 13
 14
 15

The driving fuel behind the strength of American families is the free enterprise system. The free market naturally and ceaselessly excels in creating opportunities and prosperity for families in ways that empower them. Government 'family support' programs, on which we spend \$1.2 trillion per year, are inherently inefficient, one-size-fits all, and constantly having to adjust and expand in attempt to meet families' needs.

Rachel Greszler
Research Fellow in Economics, Budget, and Entitlements
The Heritage Foundation

Clarence Carter
Director of the Office of Family Assistance
Acting Director of the Office of Community Services, Administration for Children & Families
Department of Health & Human Services

Joel Griffith
Research Fellow, Financial Regulations
The Heritage Foundation

4:00 – 4:15 p.m. **BREAK**

4:15 – 5:15 p.m. **EMERGING ISSUE #3:
REFRAMING THE FUTURE OF HIGHER EDUCATION**
Today's higher education system is in crisis. American students are \$1.6 trillion in student loan debt, the majority of students will not finish college in four years, and many drop out without a degree and struggling to pay off debt. Unfortunately, policies from Washington make these problems worse. While many claim that "free" college is the answer, this will only shift the present problems with higher education onto American taxpayers. Only by encouraging competition and innovation in the higher education sector, and reducing funds coming from Washington, can we see true improvements for students and taxpayers.

Mike Howell
Executive Branch Advisor, Government Relations
The Heritage Foundation

Angela Sailor
Vice President, Feulner Institute
The Heritage Foundation

Mary Clare Amselem
Policy Analyst, Center for Education Policy
The Heritage Foundation

5:15 – 5:30 p.m. **REACH A BUDGET DEAL**
Participants will reach a deal by this time in the trip. The Leader will read the budget resolution aloud to the body.

5:30 – 6:30 p.m. **RECEPTION**

6:30 – 8:30 p.m. **DINNER AND KEYNOTE ADDRESS:
LEADERSHIP LESSONS FROM THE THUNDERBIRDS**
Effective leaders seek to build commitment, trust, and loyalty with their teammates, whether that is in the field or in the workplace. JV Venable discusses lessons learned from serving for 25 years in the US Air Force. JV, who served as Commander of the celebrated Thunderbirds, also authored a book on leading high performance teams.

00
ST
M
0
0
0
0
0
0
0
0
0

John "JV" Venable
Col.USAF (ret.)
Former Commander, USAF Thunderbirds
Senior Research Fellow for Defense Policy
The Heritage Foundation

FRIDAY, OCTOBER 11, 2019

- 8:30 a.m. (or after) **Luggage Drop-off**
Attendees leave their luggage at the Heritage luggage check
- 9:00 – 10:15 a.m. **BREAKFAST ADDRESS & EMERGING ISSUE #4:**
WHAT AMERICANS WANT IN HEALTH CARE
Healthcare has become one of the defining issues of our current debate. Now more than ever, policy proposals such as single-payer universal care, eliminating public options, and privatized care, are drastically different from one another and from the status quo. This panel will review the current state of America's healthcare system and discuss solutions that have been prescribed to fix many of the problems arising from this system, ultimately addressing the question: What do Americans really want in health care?
- Tara O'Neill Hayes
*Deputy Director of Health Care Policy
American Action Forum*
- Nina Schaefer
*Senior Research Fellow, Health Policy
The Heritage Foundation*
- Matt Eagan
*Program Associate, Congressional Relations
The Heritage Foundation*
- 10:15 – 10:30 a.m. **BREAK**
- 10:30 – 10:45 a.m. **FINAL VOTES**
Participants will vote on the budget resolution.
- 10:45 – 11:00 a.m. **LOAD BUS**
- 11:00 – 11:15 a.m. **WALK TO USCGC TANEY**
- 11:15 a.m. – 1:00 p.m. **TOUR & DISCUSSION AT USCGC TANEY**
The United States Coast Guard Cutter Taney is the last warship still afloat that fought in the attack on Pearl Harbor. The USCGC Taney offers tours of the vessel, after which participants will learn about the historical and military context of the attack on Pearl Harbor in relation to military readiness today.
- Dakota Wood
*LtCol USMC (ret.)
Research Fellow, Defense Programs
The Heritage Foundation*
- 1:00 p.m. – 1:15 p.m. **CLOSING REMARKS**
Tommy thanks participants for attending this year's conference.

CONFERENCE

Q Q Q Q Q Q Q Q Q Q Q Q Q Q

CONFERENCE CONCLUDES

Attendees board buses; boxed lunches provided on board

BUS DEPARTS

BUS ARRIVES AT THE HERITAGE FOUNDATION



Emerging Leaders Conference 2019

Wednesday, October 9 – Friday, October 11, 2019

Royal Sonesta Harbor Court | Baltimore, MD

INVITATION LIST

About the List:

The following individuals were extended an invitation to The Heritage Foundation's 2019 Emerging Leaders Conference due to their interest in conservative policy.

Last Name	First Name	Office	Chamber
Anderson	Alyssa	Rep. Tom Emmer	House
Andrade	Barbara	Rep. Rob Bishop	House
Andzel	Christian	Rep. Chip Roy	House
Ath	Viraktep	Sen. Steve Daines	Senate
Ball	Luke	Rep. Matt Gaetz	House
Bardin	Erin	Sen. James Risch	Senate
Barton	Carter	Rep. Virginia Foxx	House
Bennett	Parker	Rep. Mike Kelly	House
Bensur	Will	Rep. John Katko	House
Besonen	Mark	Rep. Virginia Foxx	House
Boyd	Stephen	Sen. James Lankford	Senate
Bradley	Philippa	Rep. David McKinley	House
Brereton	Charlie	Senate HELP Committee	Senate
Brookhart	Mindy	Sen. John Hoeven	Senate
Brown	Matt	Rep. Bryan Steil	House
Butherus	Daniel	Rep. Ken Buck	House
Caddock	John	Rep. Alex Mooney	House
Campbell	Kyle	Rep. Tom McClintock	House
Caplin	Sarah	Sen. Mike Lee	Senate
Carrier	Adrienne	Sen. Mike Braun	Senate

Sabol	Sam	Rep. David Schweikert	House
Salmon	Diem	Senate Armed Services	Senate
Shellnutt	Makenzie	Sen. Steve Daines	Senate
Shelton	John	Rep. Bill Posey	House
Shields	Chandler	Sen. Richard Shelby	Senate
Shumate	Samuel	Rep. Ted Budd	House
Smith	Brandon	Rep. Ron Estes	House
Smith	Cameron	Rep. William Timmons	House
Smith	Heather	Rep. Debbie Lesko	House
Smith	Chandler	Rep. Ken Calvert	House
Smith	Delayne	Rep. Kevin Brady	House
Smoloski	Walter	Rep. Andy Harris	House
Sowell	Tucker	Rep. Kay Granger	House
Stebick	Elise	Sen. Mitch McConnell	Senate
Stechschulte	Alissa	Rep. Glenn Thompson	House
Stovall	Shannon	Rep. Andy Biggs	House
Strickland	Ethan	Sen. Tim Scott	Senate
Sullins	Ella	Senator Shelby	Senate
Sun	Kevin	House Republican Conference	House
Swanson	Ian	Sen. Ben Sasse	Senate
Swartz	Bryan	Sen. Jerry Moran	Senate
Tanner	Kylie	Sen. Mitt Romney	Senate
Taylor	Lydia	Sen. Marsha Blackburn	Senate
Teixeira	Mimi	Sen. Mike Lee	Senate
Thompson	Katherine	Sen. Mike Lee	Senate
Thompson	Jessica	Rep. Daniel Webster	House
Trejo	Travis	Rep. Andy Harris	House
Wagner	Matthues	Rep. Devin Nunes	House
Warren	Jim	Sen. Tim Scott	Senate
Wendt	Jonah	Rep. Chip Roy	House
Werner	Micki	Sen. Marsha Blackburn	Senate
West	Daniel	Rep. Jim Hagedorn	House
White	Grace	Rep. David Schweikert	House

Emerging Leaders Conference 2019

Wednesday, October 9 – Friday, October 11, 2019
Royal Sonesta Harbor Court | Baltimore, MD

AGENDA

WEDNESDAY, OCTOBER 9, 2019

1:00 p.m. – 1:30 p.m.	ATTENDEE CHECK-IN <i>Attendees leave luggage at the bus after check-in</i>	<i>The Heritage Foundation</i>
1:45 p.m.	ATTENDEES BOARD THE BUS	
2:00 p.m.	BUSES DEPART TO ROYAL SONESTA HARBOR COURT	
3:15 p.m.	BUSES ARRIVE AT ROYAL SONESTA HARBOR COURT	
3:30 – 5:30 p.m.	REGISTRATION <i>Attendees check-in to overnight rooms</i>	
5:30 – 6:30 p.m.	WELCOME RECEPTION AND OVERVIEW <i>Participants will gather for the first time as a group to hear brief welcome remarks. These remarks will include the purpose of the conference, a review of the agenda, and an opportunity for participants to ask any questions about logistics.</i>	
	Tommy Binion <i>Vice President, Government Relations</i> <i>The Heritage Foundation</i>	
6:30 – 8:30 p.m.	OPENING DINNER AND KEYNOTE ADDRESS LESSONS ON SERVANT LEADERSHIP <i>Servant leadership is critical in leading effective teams and living a life of purpose. Through experiences in the NFL, House of Representatives, and now at his own veterans' aid charity, Yellow Ribbons United, Derrick Dockery has led a life that exemplifies servant leadership. Dockery will discuss what it means to be a servant leader and how to use one's talents effectively to give back to their community and live a purposeful life for others.</i>	
	Derrick Dockery <i>Co-Founder, Yellow Ribbons United</i> <i>Former Business & Intergovernmental Coalitions Director, Office of Speaker Paul Ryan</i> <i>Former Offensive Lineman, National Football League</i>	

THURSDAY, OCTOBER 10, 2019

9:00 – 10:15 a.m.	BREAKFAST ADDRESS AND EMERGING ISSUE #1 TECHNOLOGY & THE FUTURE OF U.S. NATIONAL SECURITY
-------------------	--

Technology is a defining variable in the American national security calculus. These tools are not only how modern warfare is fought, but they are increasingly the battlefield itself. How does the United States navigate the tensions between free-market economics and the existential challenge of preventing Chinese cyber-enabled espionage? What are the responsibilities of US companies who are the bleeding-edge of technology innovation in an international system that sees these innovations as offering decisive advantage? In short: how can the United States thrive in an era of technological great power competition?

Klon Kitchen
Senior Research Fellow, Technology, National Security, and Science Policy
The Heritage Foundation

10:15 – 10:30 a.m. **BREAK**

10:30 a.m. – 12:00 p.m. **BUDGET SIMULATION & BREAKOUT DISCUSSION**

Conference participants will participate in a budget simulation game whereby they are divided into teams and tasked with reaching a budget deal and passing a budget resolution for the upcoming fiscal year. Each participant will draw a card from a stack, and each card will detail the team, role, and individual objectives of that participant. Participants will divide into teams, where they will hear from a Heritage expert, or 'Counsel', on the budget process and their respective teams' role in that process. Each team will also elect a participant to serve as 'leadership' for that team. Leadership conducts negotiations and speaks on behalf of the team before a large group.

Participants will conduct negotiations within and between teams, attempting to reach a deal despite the conflicting interests of each individual and party. There will be time to negotiate and whip votes between policy sessions and outside of the designated budget simulation sessions. The budget resolution will include the total funding for discretionary spending (302a allocation), the topline numbers for each individual appropriations bill (302b allocations), and policy riders. On the final morning of the trip, participants will vote on the budget resolution. It will pass with a simple majority, and participants cannot filibuster.

Tommy Binion
Vice President, Government Relations
The Heritage Foundation

12:00 – 12:15 p.m. **BREAK**

12:15 – 2:00 p.m. **LUNCHEON AND KEYNOTE ADDRESS:**

TWITTER-CRAFT: COMMUNICATIONS IN THE DIGITAL AGE

The media has changed the way the public learns issues, understands concepts, forms opinions, and spreads ideas, making effective communication vital in today's increasingly social and digital environment. What are the most effective ways to communicate? How does this change based on the issue being discussed?

Carrie Severino
Chief Counsel & Policy Director
Judicial Crisis Network

Rob Bluey
Vice President, Communications, The Heritage Foundation
Executive Editor, the Daily Signal

2:00 – 3:00 p.m. **BREAK**

3:00 – 4:00 p.m. **EMERGING ISSUE #2:
THE FREE MARKET & THE FAMILY**

The driving fuel behind the strength of American families is the free enterprise system. The free market naturally and ceaselessly excels in creating opportunities and prosperity for families in ways that empower them. Government 'family support' programs, on which we spend \$1.2 trillion per year, are inherently inefficient, one-size-fits all, and constantly having to adjust and expand in attempt to meet families' needs.

Rachel Greszler
*Research Fellow in Economics, Budget, and Entitlements
 The Heritage Foundation*

Clarence Carter
*Director of the Office of Family Assistance
 Acting Director of the Office of Community Services, Administration for Children & Families
 Department of Health & Human Services*

Joel Griffith
*Research Fellow, Financial Regulations
 The Heritage Foundation*

4:00 – 4:15 p.m. **BREAK**

4:15 – 5:15 p.m. **EMERGING ISSUE #3:
 REFRAMING THE FUTURE OF HIGHER EDUCATION**
Today's higher education system is in crisis. American students are \$1.6 trillion in student loan debt, the majority of students will not finish college in four years, and many drop out without a degree and struggling to pay off debt. Unfortunately, policies from Washington make these problems worse. While many claim that "free" college is the answer, this will only shift the present problems with higher education onto American taxpayers. Only by encouraging competition and innovation in the higher education sector, and reducing funds coming from Washington, can we see true improvements for students and taxpayers.

Mike Howell
*Executive Branch Advisor, Government Relations
 The Heritage Foundation*

Angela Sailor
*Vice President, Feulner Institute
 The Heritage Foundation*

Mary Clare Amselem
*Policy Analyst, Center for Education Policy
 The Heritage Foundation*

5:15 – 5:30 p.m. **REACH A BUDGET DEAL**
Participants will reach a deal by this time in the trip. The Leader will read the budget resolution aloud to the body.

5:30 – 6:30 p.m. **RECEPTION**

6:30 – 8:30 p.m. **DINNER AND KEYNOTE ADDRESS:
 LEADERSHIP LESSONS FROM THE THUNDERBIRDS**
Effective leaders seek to build commitment, trust, and loyalty with their teammates, whether that is in the field or in the workplace. JV Venable discusses lessons learned from serving for 25 years in the US Air Force. JV, who served as Commander of the celebrated Thunderbirds, also authored a book on leading high performance teams.

CONFERENCE

John "JV" Venable
 Col USAF (ret.)
 Former Commander, USAF Thunderbirds
 Senior Research Fellow for Defense Policy
 The Heritage Foundation

FRIDAY, OCTOBER 11, 2019

- | | |
|------------------------|---|
| 8:30 a.m. (or after) | Luggage Drop-off
<i>Attendees leave their luggage at the Heritage luggage check</i> |
| 9:00 – 10:15 a.m. | BREAKFAST ADDRESS & EMERGING ISSUE #4:
 WHAT AMERICANS WANT IN HEALTH CARE
<i>Healthcare has become one of the defining issues of our current debate. Now more than ever, policy proposals such as single-payer universal care, eliminating public options, and privatized care, are drastically different from one another and from the status quo. This panel will review the current state of America's healthcare system and discuss solutions that have been prescribed to fix many of the problems arising from this system, ultimately addressing the question: What do Americans <u>really</u> want in health care?</i> |
| | Tara O'Neill Hayes
<i>Deputy Director of Health Care Policy
 American Action Forum</i> |
| | Nina Schaefer
<i>Senior Research Fellow, Health Policy
 The Heritage Foundation</i> |
| | Matt Eagan
<i>Program Associate, Congressional Relations
 The Heritage Foundation</i> |
| 10:15 – 10:30 a.m. | BREAK |
| 10:30 – 10:45 a.m. | FINAL VOTES
<i>Participants will vote on the budget resolution.</i> |
| 10:45 – 11:00 a.m. | LOAD BUS |
| 11:00 – 11:15 a.m. | WALK TO USCGC TANEY |
| 11:15 a.m. – 1:00 p.m. | TOUR & DISCUSSION AT USCGC TANEY
<i>The United States Coast Guard Cutter Taney is the last warship still afloat that fought in the attack on Pearl Harbor. The USCGC Taney offers tours of the vessel, after which participants will learn about the historical and military context of the attack on Pearl Harbor in relation to military readiness today.</i> |
| | Dakota Wood
<i>LtCol USMC (ret.)
 Research Fellow, Defense Programs
 The Heritage Foundation</i> |
| 1:00 p.m. – 1:15 p.m. | CLOSING REMARKS
<i>Tommy thanks participants for attending this year's conference.</i> |

CONFERENCE

(

14
CO
NO
CO
CO
CO
CO
CO
CO
CO
CO
CO
CO